Journyx Timesheet 7.7

Accessing New Features

This guide includes descriptions of new features in Journyx Timesheet 7.7 and is intended for existing Journyx customers who are upgrading to version 7.7 from version 7.6. If you are upgrading from an earlier version, you will also need the guides for earlier versions. If you have additional questions about a feature, please contact your account representative or email the Journyx Support Department at support@journyx.com.

Timesheet 7.7 development efforts were focused on usability – from implementing small improvements to the user interface to adding greater flexibility and efficiency for daily administrative tasks. The following material includes guidelines for enabling and using new features. For more detailed information, please refer to the Timesheet User Manual or online product help documentation.

Holiday Schedules

- **Creating different schedules:**
  - Administrators go to Configuration > Holiday Schedules > Holiday Schedule Management to create up to 15 distinct holiday schedules.
  - A holiday schedule is populated with individual holidays and can be assigned to groups.
  - Enter a name for a new schedule and click on Save to create schedules. Click on the name of a schedule to edit the name. Select the checkbox next to a schedule and click on Delete to delete the schedule. Note: A checkbox will only appear next to a schedule if there are no holidays associated with it. To delete a schedule that has holidays associated with it, delete the holidays first.
- **Populating calendars with holidays:**
  - Administrators go to Configuration > Holiday Schedules > Holiday Management to add holidays to the individual schedules.
  - Click on Create to add a holiday to one of your holiday schedules. Select the date, holiday schedule, hours, project and other time entry details. The holiday name field will appear in the Comments on the Time Entry screen. Click on save to create the new holiday.
  - You can add a single holiday to more than one schedule by using CTRL + click to select multiple schedules.
  - The Save and New button provides a way to add new holidays in quick succession.
  - The search feature on the main Holiday Management screen provides a way to find existing holidays based on holiday name, dates, schedules or projects.
- **Assigning calendars:**
  - Administrators go to Management > Groups to assign individual schedules to Groups of users.
  - Click on a Group name to view the Group Modification screen. At the foot of this screen is a field for adding Holiday Schedules to the Group. Select schedules on the left and click on Save to include them in the Group. You can include one or more schedules in a single Group.
  - Users in the Group will see the holidays loaded as new entries on their Time Entry screens when they view a timesheet with a holiday included in the period. Like leave requests, the users will be required to save the entries when they first view the timesheet for that period.

- The holiday entries are added as open records and will still need to be approved if your users are subject to a timesheet approval plan.

Project Owners/Backup Owners

- **Setting project owners:**
  - Administrators and accounts with project creation abilities go to Management > Projects > Project Management to assign owners to projects. Note: You may have renamed your Projects tab to something else. This is typically the first column you see on your Time Entry screens.
  - Create a new project or click on an existing project name to view the Project Creation/Modification screens. In the top panel are select lists for Owner and Backup Owner.
  - You can select managers with project create/modify/delete abilities directly from the select list, or you can click on magnifying glass to find them with user search.
  - If you select the setting "Update all descendants with owner changes", the Owner and Backup owner selections will be carried over to any child projects underneath the selected project in the hierarchy.
  - Assigning an owner ensures that only the owner, and no other managers with project access abilities, can modify the selected project.
  - Owners can assign backup owners temporarily or for the life of the project.
- **Project access rights matrix:**
  - Owner and Backup owner fields ensure that project write access is limited to the assigned Project Managers for each project – even when other Project Managers have access to the project because they are serving as resources/team members.

Quick Guide to Project Access Rights:

Account Type	Projects	Read Only	Edit Access
Administrator	All Projects		X
Project Creator	Projects created		X*
Project Manager/ Owner	Projects in Groups		X
Project Manager/ Backup Owner	Projects in Groups		X**
Project Manager/ Non-Owner	Projects in Groups	X	

***Creator has edit access until a project owner is set.**

****Backup owner has edit access for all project fields except the owner field.**

Reporting & Administration

- **Ability to change user names/login IDs:**
  - Go to Management > Users > User Management and click on an existing user's full name to view the User Modification screen. Note that the Username field in the top panel is now open for editing.
  - When you change a user's user name, the existing password is NOT changed unless you also enter a new password in the password fields on the User Modification screen.

- The Username field now supports the @ symbol, so email addresses may be used as user names.

- **New System Settings for leave requests, reports and approvals:**
  - Go to Configuration > System Settings > Screen Appearance. Under Toolbar Settings, the "Show pending leave requests for approvers in the toolbar" provides leave request approvers with an option to watch for new leave request submissions in the toolbar on the left side of each screen.
  - Go to Configuration > System Settings > Approval Plans. Under Audit Trail Settings, the "Show the Commit button on reports" setting provides a way to Page 3 of 3 remove the Commit button if you are using Approval Plans to approve/commit your records. It is enabled by default, but Journyx recommends you disable this setting if you are using period Approval Plans to approve your time and expenses.
  - Go to Configuration > System Settings > Approval Plans. Under Approval Workflow Settings, the "Force approvers to view sheets before approving or rejecting them" setting provides a way to require your approvers to view individual user time, expense and mileage sheets before approving or rejecting them. If this setting is disabled, approvers can simply approve or reject based on the line item summary view in of all sheets in their queues.
  - Go to Configuration > System Settings > Approval Plans. Under Approval Workflow Settings, the "when sheet is rejected, restart approval process from the first approver" setting provides a way to restart the approval process with the first level approver regardless of the level at which the sheet is rejected.
- **Field Values tab reorganization:**
  - Go to Management > Entry Columns. The Field Values tab name has been changed to Entry Columns to clarify how it ties into the entry columns on time/expense/mileage entry screens.
  - The Entry Columns tab has been split into sub-tabs – one for each of the columns (except Project which has its own tab) on the entry screens.
- **New Group types for Projectlink users:**
  - Go to Management > Groups. Note the new search field for Group Type.
  - If you have imported users and project plans from MS Project using Journyx Projectlink, you will see two types in the search filter select list: Normal and Projectlink. Normal groups are those created manually in the Timesheet interface or using the standard Timesheet imports. Projectlink groups are created automatically by Projectlink synchronizations.
  - Because it is almost never necessary to modify Projectlink groups, filtering them out of search results makes it easier to find groups that do require maintenance.
- **Adjustment to "look back" entries for users assigned to monthly time periods:**
  - Go to Preferences > Entry Screens.
  - The X periods back field for the "Suggest current entries…" setting now looks X weeks back for users assigned to a monthly time period.
- **Option for managers to filter leave requests on Leave Management Calendar:**
  - Go to Preferences > Entry Screens.
  - The new "On the Leave Management Calendar..." setting allows managers to limit submitted leave requests to those they are able to approve.
- **Accruals automatically populated by Rate Manager rules can now be hard or soft accruals**
- **Search icons added to Project Entry Column Dependencies Modification screen**
- **Sheet Status Reports now show previous approval levels and approval dates in addition to the current approval level and approval date**